



**STATE OF WASHINGTON**  
**OFFICE OF THE STATE HUMAN RESOURCES DIRECTOR**

DIRECTOR'S REVIEW PROGRAM  
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September 6, 2012

TO: Teresa Parsons, SPHR  
Director's Review Program Supervisor

FROM: Kris Brophy, SPHR  
Director's Review Program Investigator

SUBJECT: Elizabeth Inman v. Central Washington University  
Allocation Review Request ALLO-12-006

**Director's Determination**

This position review was based on the work performed for the six-month period prior to September 1, 2011, the date Central Washington University (CWU) Human Resources received the request for a position review. As the Director's Review Investigator, I carefully considered all of the documentation in the file, the exhibits, and the verbal comments provided by both parties during the review telephone conference. Based on my review and analysis of Ms. Inman's assigned duties and responsibilities, I conclude her position is properly allocated to the Office Assistant 3 classification.

**Background**

On September 1, 2011, CWU human resource office received Ms. Inman's draft unsigned Position Description worksheet from Ms. Inman's supervisor, Ms. Cynthia Torres-Jimenez, on behalf of Ms. Inman as a request to review Ms. Inman's position for proper allocation.

By letter dated January 5, 2012, CWU notified Ms. Inman that her position was properly allocated as an Office Assistant 3 (Exhibit B-1).

On January 27, 2012, the Office of State HR Director (OSHRD) received Ms. Inman's request for a Director's review of CWU's allocation determination. In the letter, Ms. Inman requested that her position be reallocated to the Program Assistant class (Exhibit A-1).

On August 8, 2012, I conducted a Director's review telephone conference. Present during the call were Elizabeth Inman; Jason MacKay, Staff Attorney, Public School Employees of Washington; Cynthia Torres-Jimenez, Site Director, Des Moines, and Karla Shugart, Administrator, Faculty Relations and Operations.

### **Rationale for Director's Determination**

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

### **Duties and Responsibilities**

Ms. Inman's position provides administrative clerical support to the CWU Des Moines University Center located on the Highline Community College campus. During the review telephone conference, Ms. Torres-Jimenez stated the University Center offers eight bachelor and four master's degree programs which are provided by approximately 40 faculty providing instruction to students at the Center.

As stated in the Position Description worksheet, the primary purpose of Ms. Inman's position is to provide administrative clerical support to the University Center's departmental programs, activities, and services. Ms. Inman provides routine information to students, faculty, staff and the general public. Ms. Inman assists students in completing applications, forms, and other documents as part of the quarterly admissions and registration process. She provides direct clerical support to five of the University Center's academic departments.

Ms. Inman's duties and responsibilities are summarized as follows. The complete description of Ms. Inman's duties is included in the Position Description worksheet (Exhibit B-7).

- 30% Provides customer service to students, faculty, staff, and the general public by giving routine information about University Center programs, activities and services. Provides clerical and office support services to the Center by performing complex word processing tasks such as composing written communication, merging and sorting documents, integrating spreadsheet and data files, creating databases, and brochures. Formats and edits documents. Accesses PeopleSoft SAFARI for department class enrollments, class rosters, grade sheets and grade input, student information, entering information on department majors and minors, and running queries on a variety of topics....
- 30% Assists students with quarterly admissions and registration processes by helping them complete applications, forms, documents and other material required by the University. Reviews for completeness and compliance with applicable policies and procedures and informs the student of any discrepancy or further action required. Enters student information from the material in SAFARI, as appropriate. Runs SAFARI queries and maintain student files and information as appropriate. Routes accepted material to appropriate Center or campus department...
- 29% Provides support to four bachelor degree programs (LAJ), ITAM, PSYC, IDS) and one minor program (SOC). Coordinates and manages recordkeeping, both on paper and in SAFARI. Assists students with process-oriented issues. Prepares prospective Center

student materials, maintains student files and information, and prepares and monitors quarterly admissions and enrollment statistics.

- 10% Serves as the lead cashier at the Des Moines Center. Reconciles daily banking. Serves as the Center liaison with the Ellensburg cashier's office by researching refund requests and providing credit card information so refunds can be processed. Counts and makes deposit slips for coin-op machine and student affairs activities and clubs. Makes bi-weekly trips to the bank for deposits. Posts payments on SAFARI for tuition and fees. Follows established guidelines in receipt and deposit of monies received for tuition and fees. Maintains procard documents and banking records for yearly audits. Orders, receives, and maintains an inventory of office supplies and copier paper.

Ms. Torres-Jimenez participated in the review telephone conference and fully supports Ms. Inman's request. She states in her declaration (Exhibit A-5) that Ms. Inman's work requires independent action and specialized knowledge that reaches beyond the Office Assistant 3 class. She states that Ms. Inman, "spends a vast majority of her day performing work related to specific program operations for the University Center. In fact, all of what Ms. Inman does on a daily basis is done in furtherance of University Center operations."

In addition, she states that Ms. Inman provides direct support to five University academic programs including Information Technology and Administrative Management, Interdisciplinary Studies, Law and Justice, Psychology, and Sociology. She states that for those programs, Ms. Inman, "... interprets and applies CWU policies; orders textbooks; schedules appointments for faculty and students; participates in new student orientation; prepares reports on various topics for site and program directors; coordinates and administers program budgets; assists with student registration; prepares promotional materials, and plans and carries out program activities." She also states that the work Ms. Inman performs for these programs constitute a majority of her day.

#### Summary of Ms. Inman's Perspective

Ms. Inman asserts the duties she performs in direct support of five of the University Center's academic programs are consistent with the Program Assistant class. Ms. Inman asserts she works with minimal supervision and makes independent decisions about her work.

Ms. Inman contends the other aspects of her work supporting the University Center including making purchasing decisions and ordering supplies, serving as lead cashier with daily responsibility for reconciling receipts, making deposits and processing credit card funds; serving as the textbook liaison which includes making textbook orders on behalf of faculty, and performing a variety of other administrative/program support duties reach the Program Assistant class.

#### Summary of Central Washington University's Reasoning

CWU asserts that the majority of Ms. Inman's work involves performing complex clerical assignments to support the operations of the CWU University Center, and therefore falls within scope of her job classification as an Office Assistant 3.

CWU asserts Ms. Inman's position combines duties consistent with a variety of classes including Office Assistant, Secretary, Program Assistant and Fiscal Technician. CWU contends

there is no clear majority of work performed by Ms. Inman in one particular class. CWU acknowledges that while approximately thirty percent of Ms. Inman's duties fit the Program Assistant class, the largest percentage of Ms. Inman's time is spent performing complex clerical work for the University Center which is consistent with the Office Assistant 3 class.

#### Comparison of Duties

When comparing the assignment of work and level of responsibility to the available class specifications, the Class Series Concept (if one exists) followed by the Definition and Distinguishing Characteristics are primary considerations. While the Typical Work examples listed in a class specification do not form the basis for an allocation, they lend support to describing the work performed by that classification.

Additionally, most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

#### Comparison of Duties to Program Assistant

The Class Series Concept for the Program Assistant series reads as follows:

Perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor. Represent the program to clients, participants and/or members of the public.

A program is a specialized area with specific complex components and discrete tasks which distinguish it from the main body of an organization. A program is specific to a particular subject. The specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning and typically, public contact. Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks.

The Definition for this class states:

Perform specialized technical/clerical duties in support of a program activity.

The Distinguishing Characteristics for this class state:

Under general supervision, perform work requiring knowledge and experience specific to the program. Provide students, staff, program participants and/or the public with information and interpretation of policies and activities related to the program specialty. Compose written communications, and establish and maintain records relating to program operations.

The Program Assistant series describes positions which perform specialized technical/clerical duties in support of a program activity.

Approximately twenty nine percent of Ms. Inman's time is spent serving as the primary support staff person for four bachelor degree programs (LAJ, ITAM, PSYC, IDS) and one minor program (SOC) at the University Center. Ms. Inman coordinates and maintains electronic and manual records for those departments. She assists students in those programs with process-oriented issues regarding departmental activities. She prepares student materials, maintains student files and information, and prepares and monitors quarterly admissions and enrollment statistics. She prepares statistical and narrative reports regarding degree program majors using spreadsheet and database files for the Program Directors and the Site Director. She analyzes college equivalencies to update program information hand-outs for the LAJ ITAM, PSYC, and IDS programs.

While the portion of her work preparing statistical and narrative reports from spreadsheet and database files, analyzing college equivalencies to update program information hand-outs for the LAJ ITAM, PSYC, and IDS programs falls within the Program Assistant class, the primary focus of her position, and the majority of her duties as a whole, is to provide a variety of general clerical and other complex office duties in support of the University Center's daily operations.

It is undisputed that Ms. Inman provides direct support to five of the University's academic departmental programs. It is also true that a portion of Ms. Inman's work in support of these academic programs meets the Program Assistant job classification. However, the Class Series Concept for the Program Assistant class indicates that "[d]uties are not of a general support nature transferable from one program to another." Further, "[p]erformance of clerical duties is in support of incumbent's performance of specialized tasks." The majority of Ms. Inman's time is spent performing a variety of transferrable clerical and office support tasks that are of a general support nature done in support of the University Center's daily operations. For these reasons, her position should not be reallocated to the Program Assistant class.

#### Comparison of Duties to the Office Assistant series

The Class Series Concept for the Office Assistant series states that positions perform "a variety of clerical duties in support of office or unit operations." Ms. Inman's position fits within this class series concept because she performs complex clerical assignments related to the CWU University Center's daily operations.

The Definition for Office Assistant 3 states:

Under general supervision, independently perform a variety of complex clerical projects and assignments such as preparing reports, preparing, reviewing, verifying and processing fiscal documents and/or financial records, composing correspondence such as transmittals and responses to frequent requests for information, establishing manual or electronic recordkeeping/filing systems and/or data base files, and responding to inquiries requiring substantive knowledge of office/departmental policies and procedures. Positions may perform specialized complex word processing tasks in a word processing unit or complex rapid data inquiry and/or entry functions.

As indicated in the PDF for her position, approximately thirty percent of Ms. Inman's time is spent providing general customer service to students, faculty, staff and the general public for the University Center. Ms. Inman greets customers and answers phones, addresses questions, provides directions, and transfers callers to the appropriate faculty or staff.

Ms. Inman provides a variety of routine information about the University Center's programs, activities, and services to students, faculty, staff and the general public. She is responsible for coordinating and submitting the quarterly textbook orders for all Center classes. Ms. Inman schedules academic advisor pre-admission or degree progress appointments. She processes mail, assists in preparing materials for quarterly student orientations. Ms. Inman data enters grades, runs SAFARI queries upon request, and she uses her working knowledge of the CWU PeopleSoft SAFARI system to help gather, enter and provide a variety of student information and data for use by the site director, faculty and staff.

The Distinguishing Characteristics for Office Assistant 3 include the following:

Assignments and projects are of a complex nature. Independent performance of complex clerical assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures. . . .

Consistent with Ms. Inman' position, Office Assistant 3 positions work under general supervision and independently perform a variety of complex clerical projects and assignments, including assignments requiring substantive knowledge of a variety of regulations, rules, policies, procedures, processes, and materials.

Ms. Inman's position requires substantive knowledge of the University Center's admission and registration procedures. Ms. Inman spends approximately thirty percent of her time assisting students with the University Center's quarterly admission and registration process. This includes assisting students in completing quarterly admission and registration applications and forms.

Further, the typical work examples describe the scope and level of responsibility assigned to her position:

- Resolving problems and responding to inquiries regarding rules, regulations, policies, department procedures;
- Reviewing documents and records for completeness, accuracy, and compliance with rules and determining or explaining action necessary to achieve compliance or approval;
- Reviewing, verifying for accuracy, and investigating discrepancies to ensure compliance with established procedures and policies;
- Establishing and maintaining complex electronic or manual file systems or data base files;
- Preparing or assisting in the preparation, compilation, and coordination of records;

- Compiling material requiring specialized knowledge and judgment in selection and treatment of data and format.

Ms. Inman's duties are consistent with these statements. As part of the admission and registration process, Ms. Inman accesses the University's electronic PeopleSoft SAFARI system to assist students and faculty in obtaining retrieving unofficial transcripts, class enrollment and roster, grade sheet and grade input, and other student information. She processes tuition and fee payments and class enrollment, audit, drop, swap, and withdrawal requests. She routes forms to the proper department chairs for signatures. She also provides information to students regarding graduation application and tuition fee discrepancies.

Ms. Inman uses her working knowledge of the CWU PeopleSoft SAFARI system to gather, enter and provide a variety of student information and data for use by the Site Director, faculty and staff. She enters information on department majors and minors, and runs queries on a variety of topics.

When considering the totality of the duties Ms. Inman performs, approximately sixty percent of her work assignments fit within the Office Assistant 3 classification. The majority of Ms. Inman's work assignments include performing a variety of customer service and complex clerical tasks associated with the University Center's quarterly admission and registration process. These tasks are transferable clerical functions performed to support the University Center's operations and student admission and registration process. For example, Ms. Inman helps students apply and register for CWU University classes. She helps students complete application forms and other required documents. She reviews documents for completeness. She enters student information into the SAFARI student management system. She runs queries and develops reports as requested and also maintains data and files.

Consistent with the Office Assistant 3 job class, Ms. Inman's position requires independent performance of duties while having substantive knowledge about the University Center's academic services.

It is clear the work she performs is very important and valued by CWU. A position's allocation is not a reflection of performance or an individual's ability to perform higher-level work. Rather, it is based on a comparison of duties and responsibilities to the available job classifications. The Office Assistant 3 classification best encompasses the overall scope of work and level of responsibility assigned to her position.

### **Appeal Rights**

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board . . . . Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is P.O. Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located at 521 Capitol Way South, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 586-4694.

If no further action is taken, the Director's determination becomes final.

c: Elizabeth Inman  
Jason MacKay, PSE  
Karla Shugart, CWU  
Lisa Skriletz, OSHRD

Enclosure: List of Exhibits



**Elizabeth Inman v. Central Washington University**

ALLO-12-006

List of Exhibits

A. Elizabeth Inman Exhibits

1. Request for Director's Review from Elizabeth Inman, received January 27, 2012
2. CWU allocation determination letter from Karla Shugart to Elizabeth Inman dated January 5, 2012
3. Cover letter from Jason MacKay to Karen Wilcox dated March 12, 2012 enclosing the following exhibits:
  4. February 24, 2012 response from Ms. Inman to CWU allocation determination
  5. Declaration of Cynthia Torres-Jimenez, Site Director, CWU Des Moines

B. CWU Exhibits--March 6, 2012 email from HR submitting Director's review exhibits

1. CWU allocation determination letter from Karla Shugart to Elizabeth Inman dated January 5, 2012
2. Email to which the corrected copy had been attached, dated January 5, 2012
3. Email from the Site Director, Cynthia Torres-Jimenez to Karla Shugart in response to request for additional information, dated November 18, 2011 with the following attachments:
  4. Des Moines Faculty-Staff Directory
  5. Des Moines Program Director List
  6. Des Moines Org Chart
4. Position Description Worksheet for Liz Inman's position (Received by CWU HR on September 1, 2011, unsigned)

C. Class Specifications

1. Class specification for Office Assistant 3, (100J)
2. Class specification for Program Assistant, (107M)